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ABSTRACT

This paper analyzes educational finance reforms initiated in Ontario. It outlines the changes in governance, funding, and curriculum and states that reforms were implemented without proper support and forethought, resulting in chaos. The report details how the rise of a conservative government in the province led to a desire to reduce taxation and to overhaul education as a whole. The article outlines prior consultations on reform initiatives and discusses the new funding model proposed by the legislature that wrested control of taxation away from the school boards and allowed the assignation of funds without further approval of the legislature. It describes the formulas used in the new funding model and how these formulas are seen as inferior to prior models. The paper summarizes some of the court challenges to the new law, the chaos introduced by the constant changes to the law's implementation, and the problems raised by the new law, such as severe reductions in operating funds and new school construction. Changes to collective-bargaining procedures, teachers' pension plan, transportation, curriculum and funding, and special education are also discussed. The report closes with a description of the effects of the new model on teaching and per-pupil costs. (RJM)

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Centralization for Equity: A Fair Price?

A paper presented to

The 1999 Conference of

The American Education Finance Association

By

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Executive Summary

Since the election, four years ago of a radically conservative government in the province of Ontario, the Canadian province has been swept up in a maelstrom of change. "Reforms" to the province's publicly funded education system have made up a significant part of those changes.

The changes to Ontario's education system involved three broad initiatives. They are:

1. Governance Changes,
2. Changes to the education funding system, and
3. Curriculum reform.

Governance Changes

The changes to school board governance included,

(*i*) the reduction in the number of school boards from 144 to 72,
(*ii*) the establishment of four different kinds of school boards (English and French Public, English and French Separate) - so that each community is served by all four types,
(*iii*) the transfer of authority to levy taxes and determine expenditures from the school boards to the provincial government,
(*iv*) an imposition of a $5,000 cap on trustee honoraria and,
(*v*) a reduction in the authority of boards of trustees and a shift in their accountability - from the local electorate to the provincial cabinet.

Funding Reform

The changes to the education funding system involved the establishment of a new funding model which places complete control of school board finances into the hands of the provincial cabinet. Through the model, the government apportions funds, permits expenditures and sets the education property tax.

This model which is student-focussed , funds on the basis of student enrolments. It replaced the thirty-four different types of grants in the previous version, with eleven categories[1]. One objective of the grant changes was to simplify and clarify the operation of the grant structure through fewer, simplified grant categories. The grant categories are,

- The Foundation Grant which provides for the core education of every student,
- The Special Education Grant - a two-part grant which attempts to provide for a continuum of special needs,

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[1] Paradoxically, although there are fewer categories, there are many more sub-categories, defeating the goal of a simpler system.

- The Language Grant supports a range of programs to help students learn the language of their classroom or a second language,
- The Early Learning Grant - supports early learning programs in grades K to 3.
- The Learning Opportunities Grant - support a range of programs designed to help students who are at greater risk due to socioeconomic factors,
- The Geographic and School Authorities Grant - provides funds to small schools as well as rural and or remote conditions,
- The Teacher Compensation Grant - provides school boards with funds to recognize teachers' qualifications and experience,
- The Adult and Continuing Education Grant - provides funding for night school, summer school and adult day education,
- The Transportation Grant - provides funding for bussing and other student transportation from school to home and home to school **only**,
- The School Board Administration and Governance grant - pays for the cost of trustees, Directors and supervisory officers, and central administration of school boards, and
- The Pupil Accommodation Grant - pays for building new schools; operating and maintenance costs (heating, lighting, cleaning); repairs and renovations; and capital debt servicing cost.

The details of this model were released just a few months before it came into force and the model has undergone continuous revision. The substantial chaos so induced continues to this day. The difficulties introduced by the new model - which are examined in considerable detail in this paper - can be reduced to one theme; the failure to provide adequate and appropriate resources for a changing system.

Curriculum Reform

The government's overhaul of the curriculum in Ontario's elementary and secondary schools is both substantial and comprehensive. Although the bulk of the issues raised in this reform are beyond the scope of this paper, one issue - the manner in which the reforms are to be funded - is examined. It is generally recognized that when new curriculum is to be implemented, adequate funds are required for validation, teacher training, new texts and for other learning materials. Largely, those necessary funds have not been provided.

When it stood for election, the Ontario Conservative party called its election platform *The Common Sense Revolution*. Revolutionary they have been. The locus of their changes to education is to seize control, to micro-manage, to reduce cost and to limit the services provided. Perhaps the most revolutionary of all - for a parliamentary democracy - is the power given to the Ontario Cabinet to levy taxes without the permission of the Ontario Legislature and without the requirement to account for the collection and disposition of those funds.

The cumulative impact of these changes - and their steam-roller like imposition - has created chaos in our schools. Strikes, other job actions, threatened school closures, shortages of texts and other learning materials, a teacher shortage - all are consequences of the new model and the manner of its implementation.

Centralization for Equity: A Fair Price?

Introduction to Change

When Ontario's Conservative government took office three and a half years ago, education "reform" became a principal component of its plans to totally re-engineer the province's public institutions. This government seems to be schizophrenic in terms of its relationship with Ontario's education system, and issues of curriculum and education quality.

Speaking to its own citizens, the government appears to have attempted to undermine Ontario's education system with unfounded criticisms and by the fabrication of various "crisis" and shortcomings.

On one hand, the Premiere of Ontario, in foreign trade meetings (and in recent commercials aired in Canada and the US to attract American and international business) has boasted of Ontario's excellent education system. The province's fine schools and well educated workforce are cited as reasons why foreign business should invest in Ontario. At the same time, successive education ministers and the Premier have waged war on the education system as a whole calling it substandard, unaccountable, too complex, inefficient, and basically in need of severe overhall.

At the genesis of the attack on education, the Minister of Education, in a speech about his plans to reform education, noted that in order to make change in a large organization (education) you needed to bankrupt the system. "...That kind of change, that quality of change, isn't available until you bankrupt how it is. Really bankrupt how it is. If you don't create a great crisis, you'll improve to death.." In response to the following question (after his speech) "Do we need to bankrupt MET (Ministry of Education and Training) before true change can take place?" the Minister responded "In my opinion, yes, in a way that's responsible for what it is we want to accomplish, and that is to get bankrupt those actions and activities that aren't consistent with the future that we are committed to." "...I like to think of it as "creating a useful crisis". The work bankrupt might conjure up other images. Thus the government's attack on the education system started.

The government has used school boards and teachers as scapegoats noting that local property taxes had gone up over 150% from 1985 to 1995. They stated that bloated bureaucracies were responsible for these huge tax increases and received support from several right wing groups in the business community as well as city councils who wanted education off of the local tax base. This false claim was designed to divert public attention from the real cause. Each year the government set the educational mill rate provincially and then each local board would add a small amount to that rate. Over that 10 year period cited by the provincial government, it had

raised its portion of the tax rate by over 167%. At the same time the province continued to decrease is rate of provincial funding from 46.62% to 37.43% at a time when student population was increasing at over 1% per year.

Taxation was not the only issue. The government tried to make the education system the scapegoat for almost all that was wrong. Nothing which was existent had merit, from curriculum to taxation to pensions - change it all! So the onslaught started. Commercials, fireside chats, and adds decrying the ills of education hit the media. Initially the government was successful in swaying public opinion.

The government used two tactics to gain support. First, it used the issue of equity for all students to divide the education community. This had appeal within sections of Ontario's Separate (Catholic) and French Communities - where historical struggles for legitimacy were remembered. The promise to take education off the local tax base was the second tactic. This tax change was sold as a revenue neutral transfer of responsibilities, and a decrease in the duplication and waste in education.

Legislation followed which changed many aspects of education . Bill 104 decreased the number of school boards in the province. The new boards were quite large - the average board would now have about 30,000 students. Although there were fewer boards each geographical area would be served by four different boards - Public English, Public French, Separate English and Separate French systems. Some boards are geographically larger than some Canadian provinces and serve very diverse communities. The newly created Toronto Board of Education has more students than all the Canadian Atlantic provinces combined or, more students than each of the other Canadian provinces except for Quebec and British Columbia. At the same time trustees salaries were drastically reduced. The government capped the amount a trustee, anywhere in the province, could make to $5,000 - a nominal amount. The huge areas which some of the boards occupy - greater even than the size of Texas - and the cap on trustee expenditures, makes it quite difficult for trustees to serve their constituents.

There were other changes which added to the local government chaos. First, the government also introduced legislation amalgamating the cities of Metro Toronto all of which had very different methods and property tax values for taxation. This was followed up by similar "voluntary" - you do it before we do it to you - amalgamations across the province. In a second, major, related change, every property in the province was re-assessed in a four month period by a reduced assessment staff.

Not surprisingly, the government's revenue neutral tax shift turned out to be anything but revenue neutral. After the transfer of roads, public housing, welfare, and many other items, the "revenue neutral" shift left municipalities holding the bag for about an additional $3 billion dollars. The municipalities were no longer happy about having education off of their backs.

Bill 160 sparked the first province wide, every school board, teacher strike which lasted 2 weeks. Despite this, the bill passed. Through it, the government with legislative and regulatory power had seized control of all decision-making and funding for education while leaving boards to take

the blame for the chaos in the schools.

To School boards and their employees, Bill 160 seemed designed as an attempt to make the public education system fail. The bill voided all collective agreements for all employee groups in education on August 31,1998. Boards had to negotiate collective agreements with all of their employee groups without the flexibility of going to the local tax base for extra money. School board differences in spending now were to be levelled out by a "one size fits all" funding model. Permitted expenditures and required local taxes would be determined, in detail, by the government's new funding model. The resulting labour chaos extended through the 1998-99 school year and continues to this day.

The government underestimated the problem of levelling education taxes. To compound the difficulties, the property re-assessment had the effect of shifting taxes from large businesses to small ones. Some very strong supporters of the government from the small business community were badly affected. Some had seen taxation increases in the new common taxation model of 2,000%. Many small business in downtown Toronto experienced increases of as much as 500%. The government started its bandaid solutions to its legislation by freezing increases in taxation for 3 years and only allowing annual10% increases. This necessitated a further tax shift from business to residential properties. This created chaos in municipal finances. One consequence was a reduction in the funds available for certain boards and communities.

Historical Consultations

Over the past two decades there have been many consultations on reform initiatives dealing with education as well as studies which made recommendations dealing with education finance reform. Some of these were:

- Committee on the Costs of Education, 1978
- Commission on the Financing of Elementary and Secondary Education in Ontario, 1985 (the MacDonald Commission)
- Select Committee on Education, 1990 (Third Report on Education Finance)
- Minister's Advisory Council on Education Finance Reform, 1992
- French Language Education Governance Advisory Group, 1991
- Fair Tax Commission, 1993
- Royal Commission on Learning, 1995
- Greater Toronto Area Task Force, 1995 (Golden report)
- School Board Reduction Task Force, 1996 (Sweeney report)
- Who Does What panel, 1996
- 1996, the Ministry of Education and Training released a consultation paper, Meeting Students' Needs

The New Funding Model

The Funding model is, in many ways, changed from the old model. Yet, in some ways, it has stayed the same. The government's goals for change in the model were to:

- simplify the funding model so that everyone could understand it,
- reduce duplication and administration spending,
- decrease the number of trustees and limit their salaries to minimal amounts controlled by the province,
- decrease the number of teachers especially secondary teachers,
- decrease the amount of preparation time,
- direct more funds into the classroom,
- make boards more accountable to the government and to make expenditures more transparent,
- establish fiscal benchmarks against which school board expenditure could be evaluated,
- make the school financial budget year and school year contiguous,
- cut seemingly wasteful practices through the use of benchmarks which would also encourage the contracting out of services,
- reduce the number of and consolidate schools,
- take education off the backs of the local taxpayers by offloading other then provincial the services, and
- take complete control of education funding and making the boards the scapegoats for the Province's decisions.

The number of publicly funded school boards was reduced from roughly 124 to 72. The changes to school board structure involved significant issues of local democracy and control - **the government gave itself complete power over taxation and the direction of expenditure without legislative approval**. Curiously, this power grab was not an issue for the public. In fact, there was initially much public support for the government's plans to curb the powers of school boards. The public now sees the problems. The local ways of doing things and control has been lost in many sectors of school board operations. Decision making has been much more difficult because of the increased geographic size. Meetings may now involve round trip travel of 100 miles or more. Centralized decision-making over issues such as transportation have had surprising - and unintended - consequences. Community concerns do not reach distant ears. The difference between now-consolidated rural and urban boards have raised concern as very different cultures have had difficulty in finding common ground on issues facing the new board.

For the school boards, greatest change obviously came from the fact that they could no longer raise taxes for educational purposes and that the provincial government, instead of being responsible for its previous less than 40% share, now took responsibility for 100% of the funding of education. Previously the funding for a board of education was made up of the local property tax plus a grant from the provincial government up to the recognized expenditure (determined by the province). Anything above this recognized amount had to come from local property taxes. Since all of the previous boards except 2 of the roughly 124 public and Separate boards spent above this amount, there were significant differences in spending. These differences were due, at least in part, to local choices. The impact of the new funding model on the 72 Public, Separate and French boards was that there had to be more similarity in per board spending. None-the-less, the new model attempted to recognize the fact that the geographic, demographic, and population density needs of each would require some variance in expenditure. The new model uses the local - but provincially determined - property tax (both residential and

commercial) as the base for how much additional funding a board needs from the province. If the locally raised funds exceed the funding allocated in the model, the "extra" residential taxation flows to the Provincial government's general revenue fund - the fund from which all government expenditures, including grants to other school boards, are dispersed.

The intriguing thing about this change in collection of taxes by the province, is that these taxes are not reported in the government's budget and no legislative scrutiny or approval is required. This raises a number of issues. The Ontario government has a right unique to the British parliamentary democracies - the ability to raise taxes and spend them without legislative approval and oversight. This could lead to all kinds of abuses. As for the local community, who can tell what is the provincial contribution to the schools or how much local revenue is actually flowing out of the community.

The new model changed the roughly 35 grants which provided for horizontal and vertical equity in the previous funding model and moulded them into 7 new grants[2]. These new grants are outlined in APPENDIX A.

FUNDING ON AVERAGES OR BENCHMARKS

The formulas in the new funding model were based on the MET analysis of the 1997 average estimated expenditure of boards. The Ministry personnel who worked on the model worked very hard and long hours trying to obtain accurate funding information from district school boards (DSBs). This task was complicated by the need to reapportion this information - which came from the old, unconsolidated boards - into what were to be the new DSBs for the new funding model. Many of the boards had a French section which existed in the public boards as a defacto minority board within a board. Ministry personnel often had to assign the cost of these boards within the public board. Although the Ministry personnel went through several iterations of costings with boards to make the DSB business personnel aware of how important this exercise was, unfortunately, not all business officials in boards took this exercise seriously. An example was special education funding. Previously, the boards did not collect this information as it was not part of what was normally provided to the MET. In consequence, the normal accounting procedures used by DSBs did not yield the required information and there was a significant difficulty in trying to determine real costs. The poor quality information - which was of an importance not understood by the providers - led to criteria in the funding model which were likely quite unrealistic in terms of the actual special education requirements.

To add to the difficulties, the funding formula was based on a single year snap shot. As well, the averages and benchmarks which were chosen were based on the old boards. This meant that they were not weighted by DSB size or cost of operation associated with the type of district , geographic locale etc. Given that Ontario school districts vary significantly this represents a significant weakness in the process by which the model was developed - and in the model itself.

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[2] There are, however, many more subsections so the model is still quite complex.

Here are some of the impacts of these choices. First, the 1996 and 1997 years were unusually warm and without snow for most of the province. As a consequence, the averages used to calculate expenditure items such as heating, snow removal, and other such items in care-taking and maintenance were unusually low. The model then, underestimates expenditures for a more typical year. Further, the new funding model formula for these matters made no provision for the exceptional year of cold, snow, floods, fire, etc. A second issue, since wages were not harmonized in new boards and, as the funding model used unweighted averages, the wage average in the model for a given occupation, was not the wage average of the average new bargaining unit. Worse yet, there is no provision for inflation, CPI or any other natural increase in costs which are normally built into budgets. The net result of the dissonance between the model and actual experience will be a decrease in services and programs. One final problem, extra curricular costs were not figured into the new funding formula and, as a result, many schools have shut down programs such as music and have curtailed or are looking at curtailing some of the athletic programs.

COURT CHALLENGES

There was, of course, a court challenge to Bill 160 and the new funding model. The right to tax had been taken away from school boards. In the lower court decision, the right of the Separate (Catholic) school boards of trustees to tax was upheld. The mirror image argument that the public boards used to guarantee their right to tax was not upheld. The Appeal decision has not yet been released but it is expected soon. Undoubtedly, this will be taken to the Supreme Court of Canada before this is over, however, by that time a severe toll may have already been taken on public education.

A second court case arose from the Bill 160 provision which removed principals and vice principals from teacher unions. This loss of the right of freedom of association was challenged on constitutional grounds and the right of principals and vice-principals to remain in the union was not upheld by the lower courts.

The decision of the court in the first case was appealed and the case went to the Ontario Supreme Court in November of 1998. That court has yet to rule. However, regardless of the outcome, that court decision will be appealed to the Supreme Court of Canada.

Newfoundland, New Brunswick and Quebec have already done away with denominational school boards and these actions have survived court challenges which went all the way to the Supreme Court of Canada. The precedent of these Supreme Court rulings could mean that the decisions on the Ontario cases might, in the future, send the province down a similar path.

BANDAIDS AND TIME LINES

The initial announcement of the funding model was made in March, 1998 but the technical details of the funding model were released - and continuously revised - over the next four

months. The introduction of the new funding formula in this fashion created some time line difficulties for school boards. Board budgets which are normally done by the end of April (at the latest) were held up by the initial absence of specifics in the new funding formula. The missing information included specific details for items such as the funding of special education, transportation and budgetary process. This caused much delay as the boards awaited final decisions regarding these matters. The school finance regulations which normally come out in March of the year were delayed until almost June. Many boards did not pass their final budgets until almost December of 1998 for the 1998-99 school year - when approximately 40% of expenditures had been made. Tardiness aside, there were several areas of the new funding formula which seemed to cause concern immediately. These included, the amount for capital and maintenance, the special education allotment for high need students, transportation allocations, the impact on the collective bargaining process, and finally, reporting.

The new code of accounts which boards need to assign costs into envelopes was not ready until October of 1998. This was important as the new funding formula assigned certain restrictions on how funds would be expended. For example, it required that special education money be spent on special education, classroom expenditure - as defined in the model - be a minimum of 60 % of total expenditure, capital be used for capital expenditure and that expenditure for administration be capped. In November, in response to significant concerns raised by boards, the Ministry announced a further release of funds for special education and for capital and maintenance. Finally, when the government announced a change in the retirement requirements for teachers in late May, this also created additional fiscal problems for boards[3]. The overall result was chaos, setting and redoing budgets and dead lines shifting like sand at the beach. These difficulties could all have been avoided if the model had been delayed a year - after some of these problems had been discussed and input had been received from all the stake holders. The strategy to create a crisis and strike quickly - which the government had used in several other sectors - was employed again in education without any concern for the impact.

CAPITAL AND MAINTENANCE

The question of how the funding model would pay for the operation of school plant and how that model would fund required renovations, replacements and the construction of additional facilities to provide for enrolment growth, is one of the more classic failures of this new funding model. Simply put, the new funding model created a school closure crisis.

At the heart of the regulations was this premise, an elementary student should occupy 100 square feet in a school and a secondary student should occupy 130 square feet. The funding for school

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[3] When senior teachers retire in Ontario they can receive a retiring allowance of up to 50% of their annual salary. As the increased rate of retirements created by the government plan and the unhappy atmosphere in the schools was well beyond what had been budgeted for, the boards faced a cash crunch until the government agreed to under-write 80% of this cost during the early retirement window.

plant operation costs would be based on the product of $5.20, the per pupil area allotment - 100 or 130 square feet - and the enrolment. If the gross floor area of the board's schools exceeded the sum of the products of the two enrolments and the two allocations, then the board had surplus capacity[4]

Needless to say, this formula does not take into account the effect of the variations in age, program requirements and school design upon operating costs and school capacity.

School boards now faced two significant problems.

First, operating funds are based on enrolment. As a result, if the gross floor area of the schools exceeded the required capacity generated by the enrolment, the "excess" would not be funded - the funds for the required capacity would have to cover the cost of heat, light and maintenance in the "excess" as well. Additionally, the $5.20 was a "low ball estimate". It was not the Provincial average cost per square foot nor was it the amount recommended by the provinces own "Expert Panel" who reported on the establishment of a benchmark cost. This caused difficulty for boards who had many small schools, schools that were older, schools which were less than at capacity, and schools which were vocational in nature. There was insufficient funding, in most cases, to keep schools in their present state. This was a serious problem as many boards had already trimmed care-taking and maintenance costs over the past several years in an attempt to keep taxes down. The new funding model represented a reduction from the average expenditure of all boards on care-taking and maintenance and it did not make any allowance for location or cost of doing business. Often, the funds would be insufficient to keep the existing schools open.

The second problem affected new school construction. Most of the new boards occupied very large territories. If enrolment was stable or declining in one part of the board's territory while enrolment was increasing in another, the distances involved would often make bussing and school boundary shifts impractical ways of balancing out capacities. The funding model however, required that excess capacity - as measured by the funding formula - be closed before new schools are built. Some communities would have to lose their schools so that overcrowded schools in other communities would be relieved. A crisis was born.

The government plan required that school closures be considered for September of that year (1998) and that the closure decisions be announced by the previous March. This requirement caused great public uproar as boards announced the possibility of large numbers of school closures without public input. The government time lines established in prior regulations called for a year of discussion and consultation. However, the boards now had just a couple of months to make their decisions. Ultimately public pressure forced the government to delay the school closures for a year. Many boards have started the process of trying to shut schools but the

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[4] Appendix C is an analysis of the impact of this method of calculating school capacity on one Ontario high school.

sensitivity of closing community schools is such that neither the Provincial government nor the DSBs wanted to get the blame for the school closures.

The largest DSB, the new Toronto District School Board, waged war in the press announcing the closure of over 150 schools and other Districts followed suit. The pressure of such immense school closures caused the government to change the funding formula in November of 1998. The formula was changed to allow for a school whose enrolment was found to be 80% of capacity or more, to be funded - for plant operations - as if the school was at 100 percent enrolment. Secondly, boards were guaranteed at least the amount given in 1998. The government did this to stop what was a constant battle in the papers and with parent groups - who took up the cause of their school closure with a vengeance.

The area around Toronto - the so-called "905" area, is a bastion of government support. Even in these Conservative ridings the opposition to the funding model had become too intense. Pressure there came from the large number of portables which had been used for many years. Mould in these portables, and the ensuing health problems, had whole communities in a state of rage. Since the government had neglected to put money into the formula to deal with these portables , it had to find a way to deal with this. The solution was to increase funding for capital, care-taking and maintenance, and large term repairs by 20% for the 1999-2000 school year.

The important thing to note here is that these changes are not necessarily permanent but instead may be a short term fix to get the government past a possible spring election before the public sees what the cuts have really done to education. Instead of such a quick fix, the allocations to plant operations and capital need to be reviewed and the funding formula adjusted to meet the actual costs.

COLLECTIVE BARGAINING

One of the most difficult parts for both boards and employees was the fact that the legislation which enabled the government to set the funding model, also struck down all school board employee collective agreements from the predecessor boards effective August 31, 1998. The boards and their unions had to merge into a single collective agreement 2, 3, and even as many as 5 collective agreements for September 1 1998 - an impossibly short time. As an interim measure, the government gave Boards the right to impose collective agreements which unilaterally changed the working conditions of teachers and other employees until such time as the collective agreement was put in place.

Many Boards did unilaterally change the working conditions of their teachers. The start of the 1998-99 school year found many boards increasing the teacher workload by changing the uniform secondary 6 out of 8 classes to 7 out of 8 classes. Some boards implemented 6.67 or 6.5 out of 8 by having a percentage of teachers teach 4 out of 4 classes one semester and another group teach 4 out of 4 second semester. The motivation for these changes came from an apparent government objective - as seen in the funding model - to reduce costs by increasing teacher course loads. The course load increases effect savings as those changes reduce the teachers required for a given number of classes.

Another of the government's goals in the funding model was to reduce what it saw as large school administrative costs. The new funding model reduced allocations for vice-principals and for department heads. Prior to these changes, the norm for a major department head (someone with more than roughly 18 sections in a discipline) was to teach 5 classes out of 8, with one of the remaining periods allocated for administrative duties. The head would also be paid an allowance. The reduction in funds for school administration - and their separation from permitted classroom expenditure - made it almost impossible for school boards to fund any sort of period for departmental purposes - or their existing allowances. School boards used their powers to act unilaterally to reduce those expenditures. This will have a significant impact on the ability of Department heads to work with young teachers, to help overcome problems, to implement new curriculum and to deal with the day to day running of departments.

Not surprisingly, the start of the school year saw a significant number of strikes. Few of these strikes resulted in negotiated settlements and back to work legislation was introduced. In the past, such an enforced end to a strike would have led to a process of arbitration where the issues separating the two sides would have been considered on their merits. However, in other legislation, the government changed the basic premise of arbitration from "the consideration of matters on their merits" to "the administration of government policy". Thus, certain retired judges with political allegiance to the party in power were employed to settle these disputes and the judges were given strict ground rules on how to define whether or not the District had the ability to pay. Basically they were told to only listen to the management position.

To date most of the teacher contracts have been settled and the teachers, in the main, managed to avoid the "kangaroo court" style contract impositions. As a consequence, most teacher groups were able to block most of the workload increases envisioned in the funding model. Never-the-less, teachers have not viewed this outcome happily. Wage increases have been small or non-existent. This comes at the end of a period when teachers had come through 3 years of Social Contract where many saw wage decreases and nearly a decade of expenditure restraint wherein most teachers saw no wage increases, while inflation and tax increases reduced the value of their incomes. This has made bargaining very difficult and has resulted in many teachers becoming very bitter and disenchanted with the government and their school board employers.

Care-taking, clerical, educational assistants, and professional support staff contracts however, are still being negotiated[5]. The funding model, as stated previously, is designed to cap and decrease administrative costs yet. Paradoxically, by declaring all contracts void, the government has made significantly more work for school board administrations.

CHANGES TO TEACHERS PENSION PLAN

As noted earlier, in May the government negotiated a deal with the other Teachers' Pension Plan partners which reduced the unfunded government liability. The net result was a saving over the

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[5] These were delayed, in part, because of union jurisdictional disputes which arose from the mergers of the school boards. Teacher bargaining groups were not affected the same way.

next several years to the government of about $10 billion. In return, the teachers received a change in the Pension Plan window which temporarily altered the pension factor from 90 to an 85[6] factor without penalty. The penalties for early retirement in the past had been very significant. This may be the first time in the history of early retirement plans where the employees had to pay off the employer to get one.

Although this change did not produce the same pension for the retiree who leaves with an 85 factor as if the former teacher had left with a 90 factor, the poor climate within the schools, the lack of job satisfaction, and the deterioration in working conditions caused a very large portion of eligible teachers to take this reduced pension. As a result, school boards were unprepared - in light of the inflexibility of the new funding formula - to cope with this exodus. The school board associations petitioned the government for assistance in regard to retirement gratuities[7] and the costs associated with this window - which had only been announced a month before the end of the school year. government responded with a one time grant for school boards. A new form was sent to Districts to determine what percentage of teachers left early due to this window. In fairness, the government picked up the majority of this cost through this remedy - and left some boards with a windfall. School boards, however, are still worried about another year of unexpectedly high retirements at the end of this year and no money will be available for any additional exodus. It seems apparent that from the number of announced retirements at the end of the first half of the year, there will be another exodus.

The wholesale abandonment of their classrooms by senior teachers has precipitated a teacher shortage and a good portion of the new hires do not even have teacher credentials - a shameful situation.

TRANSPORTATION

Pupil transportation in Ontario has been a difficult area of funding because of the large area covered by most boards, Ontario's geography and multiple boards having jurisdiction over the same area. Urban boards such as the Toronto DSB, have had difficulty with transportation because of the major highways which run through that district and the various special needs schools. Bussing costs have also been driven up by the competition for students between the Public and the Separate system as that competition has led to more demands for door to door busing. The new funding formula initially provided 97% of the previous year's total budget for the newly amalgamated boards. The Ministry has, in the past, tried to get boards to co-operate in ventures which had integrated best practice methods between Districts. This was done to effect savings while maintaining service. Some Districts however refuse to co-operate because of

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[6] If the age of the teacher plus the years of service add to the factor, the teacher may retire, without penalty, with a pension based on the "average of the best five years of salary" and the years of service.

[7] A payment made to retiring teachers based on unused sick leave credits and, in some cases, years of service.

either policy or differences in religious belief. As the model was framed, those stubborn boards ended up with more money than the ones which tried to be efficient.

School bus costs were also increased when the Ministry increased the number of school days for the 1998-99 school year and beyond[8], but it did not take this change into account when setting up the original allocations. The facts brought out by District business officials dealing with the extension of the school year caused the ministry to fund for the extra days and once again in November of 1998, the Ministry announced a change to the formula in transportation to increase the funding from the 97% level to 100.7% of previous funding.

There are, then, two major transportation concerns which are still present and have not been addressed. The first is the concern that boards who had decreased transportation costs, established transportation consortiums, and had been best practice examples for other boards were not given any better treatment than boards which had not decreased costs or done anything to reduce costs. The second concern was that there has been no provision for the cost of transportation for extra curricular activities or for school curricular trips. If a school board serves a rural area, these costs can be extremely high and boards no longer have the power to raise taxes to meet them.

CURRICULUM AND FUNDING

While it was introducing the new funding model, the government was also involved in curriculum reform at both the elementary and secondary levels. The government introduced a new elementary curriculum in May of 1997 for implementation in September of 1997. The government did not phase it in. Instead they announced that it would be introduced all at once - a grade at a time. There was no time to train teachers. Instead, there would be one person from each board trained during the summer and these people were to train all of the teachers in the DSB on the new curriculum. The government did not allow for funds for training of teachers or time for them to do this. Boards could not raise taxes for training, new texts, or equipment as the government had taken over the tax base starting January 1, 1998. Instead the government provided money in early 1997 for text books[9] which had to be bought before the new curriculum was released.

Secondary school reform is slated for September of 1999. Like the elementary implementation, it suffers from great organizational flaws. At the time of writing, the full curriculum for next year is not available. The basic premises of the new scheme are being released as this paper is written. Teachers have been promised that at least the first few months of each course will be available before September. Students who are currently in grade 8 will not have some of the

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[8] This was part of the government's education reform project.

[9] The government "bought wholesale and sold retail". That is it paid a wholesale price for the books and charged the retail price off against the text grants it gave to boards. That, and the unsuitability of some of the texts - some print faded when rubbed - caused quite a controversy.

material needed as a prerequisite to grade 9 as the new elementary curriculum has not reached their grade level. And, once again the funding model seems to make inadequate provision for the government's ambitious changes. The government is not supplying money for texts, training, or equipment for these new courses. Some Districts, in an attempt to decrease non-classroom spending, stripped their consultants and board offices of resource personnel. There will be no help for overwhelmed teachers. In addition, the in-school curriculum resource - the department heads - have lost the time that is needed for the implementation of any new curriculum at a school and district level. Add to this the huge number of new, and inexperienced teachers who are replacing the large number of retiring ones who require mentoring, oversight and professional development. The new funding formula generates very little for PD. For most Districts, Professional Development money is down significantly. The initial guidelines for the next years funding have been released and they indicate no increase in funds for this purpose.

There is another difficulty. Funds that have been provided to assist the new curriculum have not been expended prudently. A case in point is the $10 million allocation for new science equipment. The government did recognize that changing the science content would require different science apparatus. This good idea was destroyed in its implementation. Science teachers were required, **before they saw the new curriculum** to purchase equipment, from a mandated list of items, from the supplier specified by the government, at the specified price. If a teacher found a better price or if the teacher felt that other materials were needed, the grant money could not be used. Teachers were given less than a week to assess their requirements and were required to learn new computer software in order to process their order with the government.

The government, in the new funding formula, provided money for administrative backbones for computer and Internet usage. It promised $130 million for such backbones for schools. This year, however, the government may spend up to $20 million for this wiring. The ministry budget for 1999-2000, however, at the time this is written, does not contain the remaining $110 million for this computer initiative, despite the government's public statements that this is one of their highest priorities. In addition to the failure to complete the funding for this infrastructure, the funding model does not provide for the technical support and renewal of instructional and administrative computer facilities in schools.

SPECIAL EDUCATION

Special education received particular attention in the new funding model. The province changed the funding of special education from just a flat rate per pupil to a flat rate plus a special amount based on application for high needs students. The flat rate amount known as the special education per pupil amount (SEPPA) ($347/ elementary student and $214/secondary student) is for the normal special education and support personnel. The individual student amount (ISA) is based on case application and is funded at $12,000 for an ISA 2 student at least 50% of program modification, and at least 50% of time out of normal classroom and ISA 3, which is funded at $27,000 for students with at least 80% of program modification and at least 80% of time out of the normal classroom as identified by their Individual Education Plan (IEP). ISA 1 is for equipment required for students and identified in their IEP over $500. There is also ISA 4 funding which covers education in hospitals and detention facilities and is flowed through

money. These funds have not changed in amount or type but only name.

The government has guaranteed $1,052 per pupil for special education. These funds have a reporting mechanism where boards must clearly identify how the special education money is spent. ISA funding is based on application and approval. The first time through there were glitches and some students who in the past had received support in the form of teacher aides, did not qualify under the new rules. Students who had physical handicaps but were not educationally challenged seemed to be the big losers. The government added an additional $127 million in ISA funding in November to help solve some of the special education problems. They also had a special education workgroup study the problems and make recommendations which were to be released in February of 1999. Boards will then have a 12 week period, starting in March, to apply for the ISA money for next year followed by another opportunity in November to catch any new students who the board did not expect to be present.

The biggest difficulty with the special education funding was the fact that it came too late in the first year. As a consequence, many Districts were scrambling in September and October of 1998 and some how, the secondary special education funding failed to meet the actual needs. Since in high schools, the mode of delivery is changed from that of elementary schools and the school schedules are different, many high school students were no longer qualified. Districts faced the choice of trying to provide programs with much less funding than previously present or shutting down the programs. The best example is the Ottawa-Carleton board where a high school devoted to special needs students will be closing next year do to lack of funding[10].

EFFECTS OF THE NEW MODEL ON THE TEACHING PROFESSION

As reported at last year's conference, the anticipation of the new funding model led to the first province wide political protest where teachers left the classrooms and protested for two weeks. It was one of the largest such protest in Canada's history. Since then, the fact that all collective agreements were declared null and void, caused strikes to occur in September of 1998. In fact, since the present government has taken power, there have been more teaching days lost than in all the days lost in the past 20 years under the previous legislation and governments. Teacher moral is at an all time low. The changes in working conditions have caused a significant increase in the number of sick days in the several boards where this has been studied. Now, suddenly, there is a teacher shortage. After 3 years of continual teacher bashing the government cannot understand why there would be a shortage of qualified science, math, French, and technical teachers. Teachers are now moving from one board to another to go to the one with the best collective agreement and best workload, something that has not happened for several decades. Some are even leaving the country. The government has spent over $90 million dollars on media adds to say what a great job they are doing in education and health - money that could have gone into the classroom and the emergency ward.

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[10] The local diplomatic community and the area's high technology industries have come to view Ottawa-Carleton's special education services as an essential part of the community's infrastructure. The proposed cuts may produce significant, unexpected, consequences.

Table 1. **CHANGE IN SECONDARY TEACHERS**

BOARD	# OF FTE TEACHERS 1997-98	# OF FTE TEACHERS 1998-99	Staff Difference 98-97	# OF FTE STUDENTS 1997-98	# OF FTE STUDENTS 1998-99	Difference in Students 98-97
Average	1,080	1,027	(48)	16,101	16,299	179
Pupils/teacher	14.91	15.87				
Totals	30,236	28,752	(1,483)	450,832	456,384	5,552

The chart above is for public secondary teachers only (approximately 70% of all secondary teachers in the province). Although it does not include numbers for French Separate, French Public and English Separate secondary teachers, it does indicate what has happened in our schools. Fewer teachers are now teaching more students - higher workloads and less service. This table was based on a survey done by OSSTF in late November of 1998 using information available to local teacher federations.

Our greatest fear as teachers desert our schools- has the government set up a mechanism to make the public school system fail so that charters and vouchers can be introduced?

PER PUPIL COSTS

In American jurisdictions, school finance and curriculum reforms have generally been accompanied by increased expenditure. This has not been the case in Ontario. In this decade, Ontario enrolments have grown about 2% a year while total expenditure has been held constant. As a result, the ratio of expenditures to pupils has fallen steadily. According to Statistics Canada, per pupil expenditures in Ontario fell by $400 - in Canadian funds - from 1994-95 to 1997-98[11]. The drop in real terms would be larger. The combination of American increases in educational expenditure and Ontarioan restraint has caused the members of the Ontario education community to look South with envy. As the table on the next page indicates, Ontario's per pupil expenditures have fallen steadily against those of American states since the 1991-92 school year.

[11] After correction for a "double counting" error in the data supplied to Statistics Canada by Ontario.

Table Two

Per Pupil Expenditure: Ontario's Ranking in North America in Recent Years	
School Year	Ranking
1989-90	22
1990-91	20
1991-92	13
1992-93	24
1993-94	30
1994-95	42
1995-96	45
1996-97	49
1997-98	55[12]

As detailed in this report, the new Ontario funding model is designed to limit expenditures and does not provide for what is required to adequately fund its curriculum reform. Without a change in Ontario policy, we can expect that the province will continue to slide against its neighbours.

Money does matter. Money provides for up-to-date texts and other learning materials. It can be used to lower class size and provide specialized instruction for those who require it. Money can help provide teachers with the time and resources to be effective teachers. These things make our schools work better and that matters. Ontario's publicly funded schools are critical to our well-being. In the words of the noted American school finance scholar, Maureen W. McClure[13],

> ....Democracies and free markets rest on the assumption that people are sufficiently well educated to make informed decisions at the polls and in the markets. A nation's continuing well being rests on the civility and creativity of its citizens. Civility is not genetic. Each generation must learn it anew. It must be modelled by both parents and teachers.

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[12] After correction for double counting.

[13] Dr. McClure is Associate Professor at the University of Pittsburg. The passage cited is from her chapter in *Technology and the Educational Workplace*, Kathleen C. Westbrook editor, Corwin Press Inc., Thousand Oaks CA, 1997

In these times, in addition to the role that schools play in the sustenance of civility, there is a great interest in the connections between education and the economy. Most observers recognize that there is a strong link between a well educated population and the well-being - economic and otherwise - of a society. This view is illustrated in a recent report produced by the National Center for Education Statistics (NCES), an agency of the United States Department of Education.

> Education appears to play an important role in worker productivity in all industrialized countries. The industrialized countries with the highest productivity levels tend to have highly educated work forces, and the convergence in productivity among these countries generally parallels that in educational attainment[14].

The Organization for Economic Co-operation and Development (OECD) makes an even stronger case.

> Knowledge, skills and competencies constitute a vital asset in supporting economic growth and in reducing social inequality in OECD countries. This asset, which is often referred to as human capital, has been identified as one key factor in combating high and persistent unemployment and problems of low pay and poverty. As we move into "knowledge-based" economies, the importance of human capital becomes more important than ever[15].

The OECD has conducted extensive research into the economic consequences of investment in education. In its 1997 and 1998 editions of *Education at a Glance: OECD Indicators*, it finds that the rate of return on educational investment matches or exceeds rates of return available if the funds were invested in some private sector enterprise. The table on the next page illustrates the point.

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[14] *EDUCATION AND THE ECONOMY: An Indicators Report*, NCES, March 1997

[15] Donald L. Johnston, Secretary-General of the OECD and former Canadian cabinet minister in the forward to *Human Capital Investment*, OECD, 1998.

Table Three[16]

Estimates of Canadian Private, Fiscal and Social Rates of Return for University Education

Cohort	Private	Fiscal	Social
Canadian Men	14%	7	9
Canadian Women	21	7	11

Private return: additional wages as an annual return on private expenditures
Fiscal return: additional taxes as an annual return on public expenditure
Social return: combination of private and fiscal returns - includes savings from reduced public expenditure for social supports etc.

In short, Ontario's failure to sustain a viable public education system could have serious consequences for Ontario, its economy and its people.

Conclusion

Since the election, four years ago of a radically conservative government in the province of Ontario, the Canadian province has been swept up in a maelstrom of change. "Reforms" to the province's publicly funded education system have made up a significant part of those changes.

The changes to Ontario's education system involved three broad initiatives. They are:

1. Governance Changes,
2. Changes to the education funding system, and
3. Curriculum reform.

The details of this model were released just a few months before it came into force and the model has undergone continuous revision. The substantial chaos so induced continues to this day. The difficulties introduced by the new model - have been examined in considerable detail in this paper - can be reduced to one theme; the failure to provide adequate and appropriate resources for a changing system.

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[16] Source Table F8.1 of the 1998 Edition of *Education at a Glance*, OECD December, 1998

APPENDIX A

GRANTS IN THE NEW FUNDING MODEL

The new student-focussed funding model replaced the existing thirty-four different types of grants with eleven. The idea of these grants was to simplify the grant structure through simplified grants. The following is the new grant structure:

- The Foundation Grant provides for the core education of every student. The Foundation grant is augmented by a Special Education Grant and 9 Special Purpose Grants to account for vertical equity.

- The Special Education Grant is a two-part grant. The SEPPA grant is the first part of the grant and provides $3**/ elementary pupil and $214/ secondary pupil. This part of the grant is to provide flexibility in funding the needs of most exceptional students, while the second part is an applied for grant which is funded on approved application to the Province. This grant is to meet the needs of specific students who require specialized high-cost assistance and requires a minimum of 50% program change and time withdrawal from regular classes.
- The Language Grant is intended to support a range of programs to help students learn the language of their classroom or a second language this includes native languages and English as a Second Language.
- The Early Learning Grant is to ensure that school boards have the resources to design early learning programs that best meet the needs of children in their communities. This is a K-3 grant which allows for alternative modes of delivery of this education.
- The Learning Opportunities Grant is to support a range of programs designed to help students who are at greater risk of academic failure because of their social and economic situations. This grant collapsed a number of Compensatory Grants which addressed factors such as single parents, low income, etc. The formula which the funding model is based is very complex and based on Census data. To date the formula generates a value for Districts.
- The Geographic and School Authorities Grant is to provide funds for additional costs faced by boards in rural and remote areas, boards operating small schools or serving sparse student populations, as well as district school authorities
- The Teacher Compensation Grant is a grant which is totally new and attempts to provide school boards with funds to recognize teachers' qualifications and experience. This grant has a unique feature in as much as if a board hires new teachers and keeps all of its old teachers, the grant decreases.
- The Adult and Continuing Education Grant is to provide funding at a different rate for students 21 and over taking credit courses leading to an Ontario Secondary School Diploma. This grant also funds summer school for secondary school students and "Heritage Languages")
- The Transportation Grant provides funding for bussing and other student transportation from school to home and home to school only. Transportation for programs such as extra curricular programs must be funding from other sources outside the model.

- The School Board Administration and Governance grant pays for the cost of trustees, Directors and supervisory officers, and central administration of school boards. One of the main foci of the funding formula was to reduce administrative costs. It has yet to be seen if anything other than trustee costs have in fact been recognized.
- The Pupil Accommodation Grant is designed to pay for building new schools; operating and maintenance costs (heating, lighting, cleaning); repairs and renovations; and capital debt servicing cost. The funding formula generates money so that boards must go into debt to build buildings. It is based on average costs of construction in 1997 and will require a 20 year mortgage or bond to pay for new construction. The part of the grant for new construction is only given if the District has no empty pupil spaces.

APPENDIX B

Foundation Grants

The following table shows the Ministry funding and determines the total dollars generated per secondary and elementary student and then at the end determines the Foundation Dollars.

Table Four

FOUNDATION GRANT

Secondary	No. staff/ per1000 students	Average Salary + Benefits	$/pupil for supplies & services	Allocation /pupil
Classroom Teachers (CLASS SIZE: 22:1)	40.9	50,000 + 12%	0	2,362
Proffesional Development			12	0
Occassional Teachers			60	0
Teacher Assistants	0	0	0	0
Textbooks and Learning Materials			100	100
Classroom Supplies			173	173
Classroom Computers			56	56
Library and Guidance	1.1 Lib. 2.6 Guid	50,000 + 12%		208
Professionals & Para-Professional Support	2.1	42,850 + 14.8%		102
Preparation Time	8.18	50,000 + 12%		458
Teacher Consultants	0.5	68,829 + 12%		42
In-School Administration	Principal 1.1	84,825 + 12%	5	106
	V.P. 1.5	74,877 + 12%		127
	Dept Head 9.0	3,200 + 12%		33
	Secretaries 5.33	29,288 + 18%		186
Total Foundation Grant Secondary	63.31 exc Dept Heads		406	3,953

Elementary	No. staff/ 1000 students	Average Salary + Benefits	$/pupil for supplies & services	Allocation /pupil
Classroom Teachers (CLASS SIZE: 25:1)	40.00	50,000 + 12%	92	2,331
Teacher Assistants	0.2	22,158 + 16%	0	5
Textbooks and Learning Materials			75	75
Classroom Supplies			77	77
Classroom Computers			43	43
Library and Guidance	Lib 1.3 Guid .2	50,000 + 12%		82
Professionals & Para-Professional Support	1.33	42,850 +14.8%		65
Preparation Time	4	50,000 + 12%		227
Teacher Consultants	0.5	68,829 + 12%		37
In-School Administration	Principal 2.75	77,779 + 12%	5	243
	V.P. 0.75	70,976 + 12%		60
	Dept Head 0.0	0		0
	Secretaries 3.67	27,804 + 18%		122
Total Foundation Grant Elementary	54.7		292	3,185

Dollars Produced from Foundation Grant	ADE	Foundation Grant		Total
Elementary		$3,367		$0
Secondary		$3,953		$0
Total				$0

Dollars Produced from Foundation Grant	ADE	Foundation Grant		Total
Classroom Dollars Secondary	0.00	$3,001		$0
Non-Classroom Dollars Secondary	0.00	$606		$0

In short, the 130 sq. ft per student standard - 100 sq ft for elementary students - cheats schools of necessary operational funds, has overstated the province's supply of surplus classroom space and has led to an unnecessary school closure crisis.

Appendix C

Analysis of the Impact of the Funding Model Capacity Calculations Upon a High School

This analysis is based on a school in the Eastern part of Ontario.

1. Enrolment for grant purposes ,700 students
2. Funded floor area 91,000 sq. ft.
3. Actual gross floor area(GFA) 138,137 sq ft
4. Enrolment to fund GFA 1063 students
5. Rated capacity of the school, 867 students
6. Funded floor area at rated cap.112,710 sq ft

The rated capacity of the school is calculated by assigning 22 students to each classroom and nine students to one special education room. Arguably the sum is 44 students too high because students are assigned to two rooms which should be left free - the pentium lab and one gym - so that students can use it as their curriculum requires. The real rated capacity should be 823. The basic assumption behind the calculation is also flawed. Unlike an elementary school, it is difficult to fill all high school classrooms at all times in the timetable. A loading of 80 to 90% is more reasonable. At an 85% loading the capacity would be 700 - the current enrolment.

One can make the following observations. First, the school is now close to its practical capacity - if class sizes are to average 22 and if the necessary time-tabling flexibility is to be maintained. Second, if the enrolment was at the official rated capacity, that enrolment would only fund the operation of 82% of the gross floor area. To put it another way, enrolment would have to exceed the rated capacity by 23% for the funding model to support the entire floor area!

In addition to the inadequate funding of the operation of the school, the Ministry calculation creates a second problem. By this calculation, the school has 47,137 sq ft of surplus capacity, equal to space for 363 extra students - when arguably the school is nearly full. If enrolment growth in another part of the board requires additional facilities, the nominally "extra space" in this school - and others like it - will have to be disposed of first.

How did this state of affairs come about. As noted earlier, this formula does not take into account the effect of the variations in age, program requirements and school design upon school capacity. This school has a large gym, a shop area, wide halls, a cafetorium, an atrium and several student locker areas. The flat 130 sq ft per student allocation does not take such things into account. In the same fashion, a school with an extensive vocational or technical program would likely have a GFA well above that permitted in the 130 sq ft per student allocation..